



# NetDoc AD 2013

NetDoc AD is a tool for the semi-automatic documentation of Active Directory Directory services based on Microsoft Visio.

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## Overview

Active Directory is a directory service – essentially a directory database – which contains hierarchical information about the objects that exist in your windows-based network, as well as properties for each individual object. Naturally, the amount of data in an AD can be quickly become quite large!

While the use of AD has become widespread, there is still no standard methodology for the documentation of existing directories.

Microsoft Visio™ 2013 Professional, which is part of the Microsoft Office family of applications, is the perfect tool for helping in this documentation process. It's drag-and-drop drawing capabilities have been a favorite of users for years. Visio's component-based technology and automation capabilities allow it to be extended programmatically, and that's precisely where NetDoc AD comes in.

NetDoc AD is an add-in that integrates seamlessly with Microsoft Visio 2013. Through the use of an integrated directory explorer, drag-and-drop drawing, and AD interfaces, you can easily diagram the most important aspects of your Active Directory.



You can expand a directory in the NetDoc AD Explorer, and then drag the whole thing in one fell swoop onto the Visio page! Or, you can drop a single node onto a page, and click-and-expand on down the tree as you wish.

Each shape represents a node in your directory, and contains AD properties that you can view by selecting the shape and opening a window.

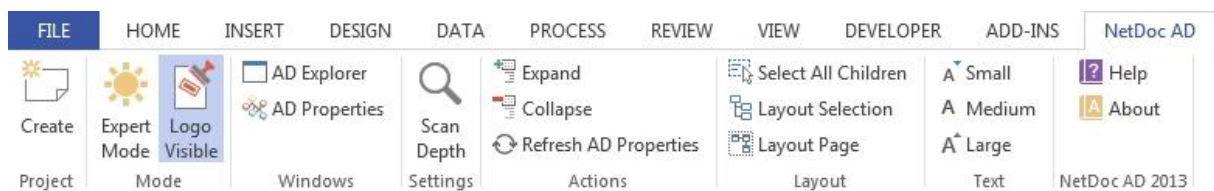
We call it semi-automatic drawing, because you can diagram just those portions of the network that you want, but are free to expand and collapse particular segments as you wish.

Once you've created diagrams of the important parts of your directory, you can save and archive the drawings as a backup device, or to serve as a comparison against future states. You can easily print the diagrams for storage, or you can publish them to your intranet using Visio's built-in Save As Web feature.



## Getting Started

After installing NetDoc AD, start Microsoft Visio 2013. Visio should present you with a new "NetDoc AD" ribbon tab. You can open an existing NetDoc AD document as you would normally do or create a new one by selecting the "Create" option in the "Project" group.





## User Interface

When the NetDoc AD template is finished loading, you should see the AD Explorer window docked inside of the Microsoft Visio user interface, along with a custom NetDoc AD ribbon tab.

The NetDoc AD add-in knows that it should only create these elements when NetDoc AD templates are loaded, so you don't have to worry that your workspace will be cluttered when you are working on sorts of diagrams.

## AD Explorer Faces

The AD Explorer window can have several faces, depending on the status of your license, or whether or not you are logged-in. The various forms are shown here:

## Licensing

The first time you run NetDoc AD, the explorer window present you with the choices of running in demo mode, or obtaining a license.

The screenshot shows a window titled "AD Explorer" with a close button (x) in the top right corner. Inside the window, there is a blue hyperlink labeled "Update License". Below this, there are three input fields: "Domain" with a dropdown menu showing "oneAssist", "User" with the text "Administrator", and "Password" which is currently empty. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".



If you purchased a license from oneAssist, then click the top button and simply enter your license key.

If you are evaluating the product, then simply continue. NetDoc AD will run in Demo Mode if no license key is provided. In Demo Mode, you will have the full functionality of NetDoc AD, except that your data will be truncated.

## Login

Once your product is licensed, you will be presented with the chance to login to a domain.

If you are a Single-domain licensee, then the Domain drop-down will be grayed-out, and you will only be able to work with the domain for which you were licensed.

Simply enter your credentials and click "OK".

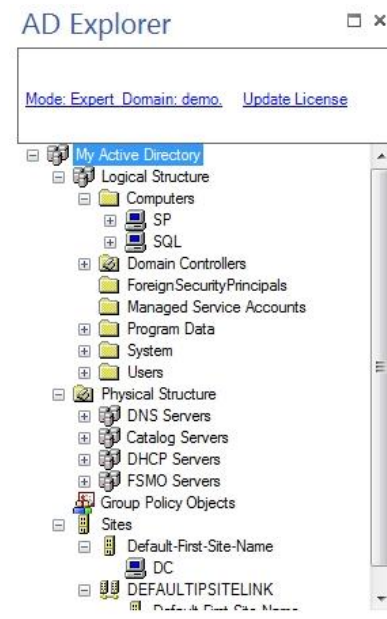


## NetDoc AD Explorer

After a successful login, you should see a tree-view which represents your Active Directory. OUs and elements can be expanded and collapsed with a simple click of the mouse.

In the screenshot we can see that the nodes *Computers*, *Physical Structure*, and *Sites* have been expanded.

You can drag any node onto the drawing page. NetDoc AD will add the nodes exactly as shown to the drawing page. So you can quickly configure the nodes you want to see in the explorer, and then simply drag them to the Visio page.



## Creating Diagrams

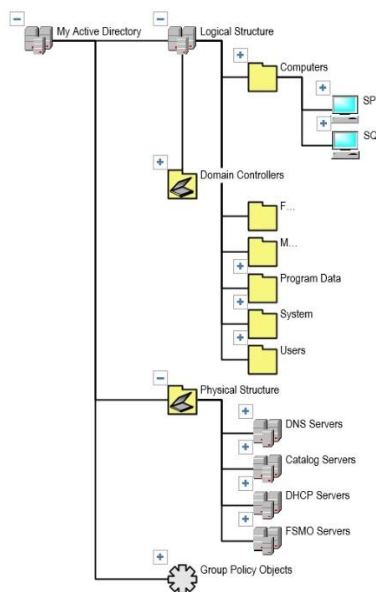
To create a diagram, simply drag any node you wish from the Explorer to the drawing page. NetDoc AD, in combination with Visio will automatically place the corresponding shapes onto the drawing page and connect them. In addition, each shape will be populated with the corresponding AD properties for the element that the shape represents.





Notice, that when dragging from the Explorer to the Visio drawing page, all elements that are expanded below the tree node that you select will also be drawn.

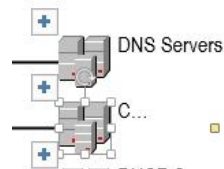
In the illustration below, we dragged the My Active Directory domain node onto the page, and NetDoc AD automatically drew the sub-nodes for us, exactly as they were shown in the expanded tree.





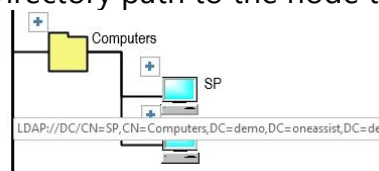
## Shape Text

NetDoc AD shapes have two text blocks. The default text block is near the top of the shape, and shows the display name for the node. This text is not user-editable, however you can abbreviate it by pulling on the yellow handle. If you select a shape and begin typing, then a second block of text will show the text that you have typed.



## AD Path Screen Tips

If you pause the mouse cursor over a NetDoc AD shape for a second, you can get a quick glimpse of the Active Directory path to the node that the shape represents.



## User Groups

A nice feature of NetDoc AD 2013 is that it lets you browse User Groups as though they were containers. The built-in tools that come with Windows Server do not offer an easy way to view the members of a group. In NetDoc AD, you simply expand a Group by clicking an Explorer node or a Shape on the Visio page!



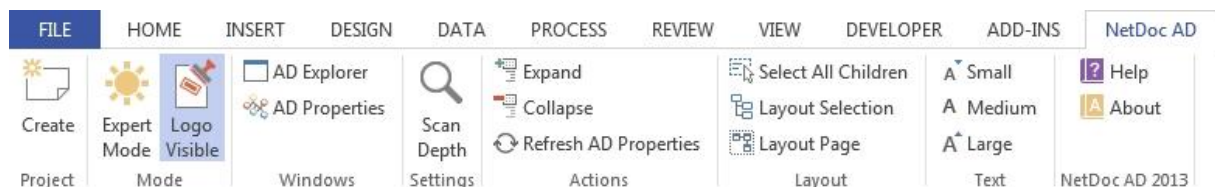
## Menus

NetDoc AD installs a "NetDoc AD" ribbon tab in Visio's ribbon. Also, NetDoc AD shapes have Smart Tags and right-click Context menu items that offer special functionality.

## Ribbon Tab

The NetDoc AD ribbon tab offers various functions for expanding and collapsing AD shapes on the page, selecting and laying out tree segments, and showing and hiding the NetDoc AD Explorer and Custom Property windows.

The main NetDoc AD menu has functions that apply to the solution in general, or to all selected shapes.



### **Project -> Create**

Opens a new NetDoc AD document.

### **Mode -> Expert Mode**

Toggles between the NetDoc AD Basic and Expert Modes. The Expert Mode automatically displays the AD Explorer.

### **Mode -> Logo Visible**

Toggles the NetDoc AD logo in the background of your drawing.



**Windows -> AD Explorer**

Shows and hides the AD Explorer in the current window.

**Windows -> AD Properties**

Shows and hides a properties window. The properties window displays all the AD properties for the selected shape.

**Settings -> Scan Depth**

Sets the level of the scan depth.

**Actions -> Expand**

Expands all selected node-shapes one level.

**Actions -> Collapse**

Collapses all selected node-shapes. All shapes below each node will be deleted, but your Active Directory will be unaffected, of course!

**Actions -> Refresh AD Properties**

Updates the Active Directory properties for all selected shapes. If your AD has recently changed, this is a nice option for refreshing your data.

**Layout -> Select All Children**

Selects all children of all selected shapes, plus their connectors. This makes it easy for you to make a copy of a tree segment for various documentation purposes.

**Layout -> Layout Selection**

Automatically performs layout and organization of the children of all selected shapes, but does not move the top-most parent shapes.



**Layout -> Layout Page**

Automatically performs layout and organization of all tree segments on the page. All shapes may change location when this option is used.

**Text -> Small/Medium/Large**

Changes the text size for the NetDoc AD shapes in the document. All NetDoc AD shapes will have the same text size.

**NetDoc AD 2013 -> Help**

Displays this help file.

**NetDoc AD 2013 -> About**

Shows a dialog that contains information about the product, access to web sites and support.

Smart Tag Shape Menu

The Smart Tag is found next to NetDoc AD shapes that are on the drawing page. This menu is accessed by clicking on the little icon that appears to the top-left of each NetDoc AD shape.

Shapes that are container shapes will have a "+" or "-" that is always visible. The Smart Tag menu is accessed by clicking these icons.

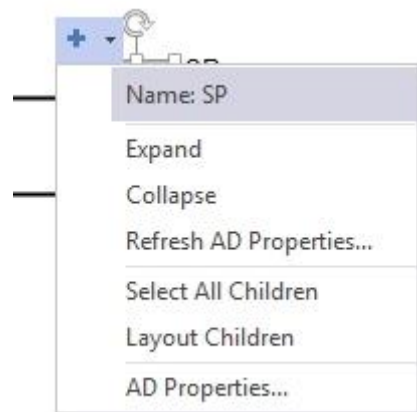
Shapes that are not containers only show the information icon – the "i" – when the mouse is over the shape. But the Smart Tag menu functions just the same as for the container shapes.



You can also right-click shapes to get to these functions. All items in the Smart Tag Menu are duplicated in the right-click Context menu.

### **Name**

This is purely an informational menu item. If you are zoomed out too far to read the text on the shapes, this menu item provides a quick way to find out the name of an object.



### **Expand**

Expands all selected node-shapes one level.

### **Collapse**

Collapses all selected node-shapes. All shapes below each node will be deleted, but your Active Directory will be unaffected, of course!

### **Refresh AD Properties**

Updates the Active Directory properties for all selected shapes. If your AD has recently changed, this is a nice option for refreshing your data.

### **Select All Children**

Selects all children of all selected shapes, plus their connectors. This makes it easy for you to make a copy of a tree segment for various documentation purposes.

### **Layout Selection**

Automatically performs layout and organization of the children of all selected shapes, but does not move the top-most parent shapes.



## **AD Properties**

Shows and hides a properties window. The properties window displays all the AD properties for the selected shape.

## Smart Tag Icons

The NetDoc AD uses an exciting feature of Visio called Smart Tags. Each NetDoc AD shape displays a Smart Tag icon in its upper-left corner. These icons give you access to menus that contain special NetDoc AD functionality. Simply click on the icon to view the menu.

Depending on the status of the shape, the icon will change. Understanding the meaning of the icons will better help you to use NetDoc AD.

### **Information**

Shapes that represent AD objects that are non-containers or are containers without children, display the information icon.

This icon only appears when you move the mouse over the shape. This saves clutter in the diagram, since the most important icons are for shapes that can be expanded and collapsed.

### **Expand**

Shapes that represent AD objects that are containers display the "+" icon.

These shapes can be expanded by choosing Expand from the Smart Tag menu.

### **Collapse**

Shapes that have been expanded display the "-" icon.



These shapes can be collapsed by choosing Collapse from the Smart Tag menu.

When you choose collapse, all of the child-shapes will be deleted, not just the immediate children.

### **Mixed Status**

Shapes that have been expanded, but have had a number of their child-shapes deleted display the "?" icon

You can choose Expand to re-populate the shapes child-set, collapse the remaining shapes, or just leave the shapes as they are.

### Properties of the objects

NetDoc AD also extracts a set of the properties from the AD objects and stores them in shapes. Therefore, the user not only has a graphical view of the AD, but also detailed information about each object.

The data is stored in the Custom Properties of each shape. These properties can be viewed by showing the Custom Properties custom window. To view an "always on" custom properties window, choose "AD Properties" from the "Windows" group of the NetDoc AD ribbon tab. For a pop-up view of the properties, click the smart-tag that hovers over each shape, and select "AD Properties..." at the bottom of the menu.

Property Name	Value
dNSHostName	SQL.demo.one
dSCorePropagationData	01.01.1601 00:00
instanceType	4
isCriticalSystemObject	False
lastLogoff	01.01.1601 01:00
lastLogon	16.07.2013 16:14
lastLogonTimestamp	11.07.2013 10:25
localPolicyFlags	0
logonCount	29
msDS-SupportedEncryptionTypes	28
name	SQL
nTSecurityDescriptor	N. A.
objectCategory	CN=Computer,
objectClass	computer
objectClass	organizationalP
objectClass	user
objectClass	person
objectClass	top
objectGUID	8d1168d2-8a87-
operatingSystem	Windows Serve
operatingSystemVersion	6.2 (9200)
primaryGroupID	515
pwdLastSet	15.07.2013 13:30
sAMAccountName	SQLS
sAMAccountType	805306369
servicePrincipalName	HOST/SQL
servicePrincipalName	RestrictedKrbH-
servicePrincipalName	HOST/SQL.derr
servicePrincipalName	RestrictedKrbH-





Using Microsoft Visio's reporting modules; reports can be generated that make use of these properties. Documentation can also easily be created in various formats (HTML or XML) and afterwards printed or stored for other purposes.



## Summary

NetDoc AD is an add-on for Microsoft Visio that helps you semi-automatically document your Active Directory networks. In combination with the corresponding shapes and properties an easy-to-use documentation of the AD can be created.

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